

Travel Manitoba Fish/Hunt Summit Facilitated Session Report

Prepared for
Travel Manitoba
May 2013



RESEARCH INC.

...for what you need to know.

For more information on this research project, please contact:

Probe Research Inc.

Suite 850 – 125 Garry Street | Winnipeg, MB R3C 3P2

Tel: (204) 926-6565 | Fax: (204) 926-6566

E-mail: probe@probe-research.com

TABLE OF CONTENTS

Background & Methodology	Error! Bookmark not defined.
Background & Objective	3
Review of the 2012 Survey Results	4
Fish/Hunt Summit Survey Results	4
Environics Analytics Research Results on Master Anglers	4
SWOT Analysis – Assessment of the Hunt/Fish Industry.....	5
STRENGTHS/OPPORTUNITIES RELATIVE TO TRAVEL MANITOBA.....	6
WEAKNESS/THREATS RELATIVE TO TRAVEL MANITOBA	7
General Assessment of Travel Manitoba.....	8
Perceived Roles & Responsibilities	8
Travel MB Marketing Opportunities	9
Prioritizing Marketing	9
Industry-Generated Marketing Ideas	10
Huntfishmanitoba.ca Online Presence.....	10
Future of the Guide	12
Additional Thoughts.....	12
Appendix:	13
✓ Screener Instrument	
✓ Moderator’s Guide	

Background & Objective

Travel Manitoba commissioned Probe Research Inc. to facilitate a planning session among Manitoba hunting and fishing outfitters and lodge operators on April 11, 2013. This discussion covered a number of topics, including the ongoing challenges confronting the fish/hunt sector in Manitoba and the role of Travel Manitoba in promoting this industry sector. This planning session was the third annual gathering of provincial hunting and fishing outfitters and lodge operators and Travel Manitoba personnel.

The six-hour discussion was facilitated by Lloyd Fridfinnson, Vice President at Probe Research and followed a guide prepared in consultation with Travel Manitoba (See Appendix I). There were comparable numbers of participants representing fishing lodge operators and hunting outfitters. The executive director of the Manitoba lodges and Outfitters Association also participated in this session, alongside four representatives from the province of Manitoba's Conservation office and Travel Manitoba personnel. Amanda Nicholls of Probe Research observed the session and recorded notes that were used to form the basis of this report.

For more information on this research project, please contact Lloyd Fridfinnson, Vice President at:

Probe Research Inc.
Suite 850 – 125 Garry Street
Winnipeg, Manitoba
R3C 3P2
T: 204-926-6565
E: Lloyd@probe-research.com

Review of the 2012 Survey Results

Three presentations reviewed Travel Manitoba's research and marketing initiatives of the past year (Fish/Hunt Summit Survey Results, Environics Analytics Research Results and a presentation of the past year of marketing initiatives). In response to these presentations, participants offered a range of comments.

Fish/Hunt Summit Survey Results

- One participant asked why so many outfitters are using print sources as marketing tools, when so few identified it as a viable marketing option (only 10% of the 31 people surveyed identified print as "most effective for increasing business", whereas 61% identified they currently market in print form).
- Looking forward, lodges and outfitters would like to see enhanced web-based marketing across the sector in the coming year to increase overall effectiveness of promotional efforts. It was argued that this mode of marketing constitutes the highest return per marketing dollar spent by lodges and outfitters.

Environics Analytics Research Results on Master Anglers

- There was some confusion among industry stakeholders about exactly what this research showed and about how it could be used to increase business. Indeed, participants asked as to how this information will be used by Travel Manitoba. In response, Travel Manitoba indicated the research program would be used as a directional tool to determine which regions should be the target of marketing initiatives such as trade shows and media.
- One participant identified a concern surrounding the validity of the Environics research, as it was based on data from 2008 to the present. This participant was unclear as to how the compilation of this perceived old data could help forecast future marketing initiatives.
- One participant was curious if there was any change in the regional distribution of potential hunt/fish clients over the years. Rick Gaunt stated that the regions had generally stayed the same (ie, the same states representing the greatest market potential) but that there is the potential to further narrow marketing efforts to specific cities and even neighbourhoods with this research. Thereby increasing effectiveness of marketing efforts.
- Some concern was expressed as to why Travel Manitoba did not use lodge owner/operator clientele records instead of paying for research. This was clearly a case of miscommunication between a few participants who may have not received or responded to communication from Travel Manitoba requesting precisely this type of information.

SWOT Analysis – Assessment of the Hunt/Fish Industry

Participants were presented with last year's Strengths/Weaknesses/Opportunities/Threats (SWOT) Analysis. The breakdown of the SWOT had been devised during earlier research between Travel Manitoba and kisquared and agreed upon by participants in the 2012 Hunt/Fish Summit. Participants were asked to review the earlier SWOT findings and to validate, remove or relocate issue areas. Session members were also asked to identify the points of greatest importance to the development of their businesses and the overall sector.

- Only one item was removed from the SWOT chart below. "Small operations" was no longer seen as a weakness to the industry. The rationale for this decision was based on the collective opinion that small operators whose unprofessionalism was regarded as harming the sector had largely ceased operations. Less competent small operators working along the Red River was mentioned as the one exception to this general trend.

Various additions or amendments were made to the table above including:

- Natural geography expanded to include the quality of resources available in Manitoba (e.g. Trophy hunting and large quantity and diversified fish species), under the strengths column.
- Additions to the strength quadrant included: the logistical accessibility of Manitoba to all North Americans as a positive, although there was evident recognition that existing border crossings regulations constitute a barrier for travel by a significant proportion of prospective American customers.
- Similarly, participants identified existing interest in the Manitoba hunt/fish market by those outside of Manitoba as a strength.
- A better understanding of aboriginal tourism offerings and potential partnerships was identified by both lodge operators and outfitters as an emerging opportunity.

Strengths & Opportunities:

- Participants regarded the quality of the fish/hunt product and the experience of reputable operators as being key strengths upon which to build future marketing efforts. These qualities were viewed as creating another strength in the form of a strong track record of customer satisfaction.
- Both of the key opportunities identified by participants involved marketing initiatives. Consistent with remarks earlier in the day, participants voiced a desire to have expanded online marketing initiatives by both travel Manitoba and individual operators. Furthermore, participants expressed a desire to pursue new markets in addition to continued promotion to established regions.

Weaknesses & Threats:

- Weaknesses included a general lack of marketing over the fish/hunt product, particularly on the part of individual operators. Participants also felt that the industry itself must provide a greater range of product and service offerings to an evolving clientele. Conflicting natural resources regulation management expectations was also cited as a challenge for the sector. There was some discussion between participants and representatives of Conservation Manitoba concerning the challenges in managing the resource and subsequent communication with launch operators and outfitters.
- Key threats included an aging customer base, as well as increased competition from similar outdoor product in North America, particularly Ontario.

A detailed summary of the SWOT outcomes appear in the following table. Issues of key importance appear in bold in the table below.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ✓ Significant local market ✓ Natural geography/quality of resource ✓ Product diversification ✓ Experienced, reputable operators ✓ Homegrown industry ✓ Customer satisfaction ✓ Strong share of wallet ✓ Optimistic outlook ✓ Accessibility/strong dependable logistics ✓ Interest in market 	<ul style="list-style-type: none"> ✓ Small share to operators ✓ Insurance costs ✓ Lack of marketing (from the operators primarily) ✓ Limited offerings/resistance to change ✓ Vulnerability to external changes ✓ Conflicting regulation management expectations ✓ Remote locations and lack of infrastructure
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ✓ Upsell to Manitobans ✓ Fill capacity & increase operator share ✓ New markets ✓ Leverage leadership ✓ Aboriginal tourism ✓ Continued product diversification ✓ Champion those ready for growth ✓ Expand online marketing ✓ Use technology to meet customer needs ✓ Leverage loyalty ✓ Make license purchase easy ✓ Special events ✓ Canadian and international partnerships 	<ul style="list-style-type: none"> ✓ Aging industry and customer base ✓ Reliance on word-of-mouth ✓ Limited labour supply ✓ Fuel costs ✓ Intensified competition

STRENGTHS/OPPORTUNITIES RELATIVE TO TRAVEL MANITOBA

During a subsequent discussion of the strengths and opportunities for the hunt/fish sector, participants offered a variety of comments specific to Travel Manitoba:

- Manitoba continues to be seen internationally as a lush wilderness landscape with experienced and reputable tour operators. To this end, participants suggested it would be a useful marketing technique to post client testimonials somewhere on the Travel Manitoba/hunt and fish website.
- Participants stated that they would like to see the continued expansion of online marketing efforts by Travel Manitoba. From the operator or lodge owner perspective, Travel Manitoba's recent efforts to improve their online presence was regarded as "catching up" to the industry: neither cutting edge, nor lagging.
- While it was determined that constructing a hunting website similar to the Master Angler Online would have negative public relations implications, it was felt that a possible partnership Big Game Manitoba could help promote the hunting in Manitoba with the overall goal of building brand awareness, ambassadorship and public appreciation of the product. Suggestions included holding a banquet in Minneapolis for trophy big-game hunters.
- Hunt/Fish industry stakeholders expressed a desire for Travel Manitoba continue its marketing efforts and to expand into new markets.

WEAKNESS/THREATS RELATIVE TO TRAVEL MANITOBA

During a group discussion of the weaknesses and threats to the hunt/fish sector, participants requested that Travel Manitoba provide direct services as well as indirect supports:

- The continued training of industry stakeholders with respect to effectively marketing their business was seen as a necessity for the industry. While almost all participants identified Facebook as a social media resource for their business, some businesses had no further on-line presence. Additional Internet-based resources utilized by some within the sector included YouTube and Trip Advisor. However, it was clear that only a select few were capitalizing on these or other on-line marketing tools leading to the suggestion that could be an area for training and education provided by Travel Manitoba.
 - There was an opposing view with respect to Travel Manitoba providing free training to outfitters. It was argued that each operator should be responsible for their own education and keeping pace with the times. Some felt quite strongly that training of this nature constituted a waste of Travel Manitoba money which could otherwise be spent on industry marketing.
- Conservation “road blocks” were identified as an industry weakness. Lodge owner/operators would like to see greater collaboration between Manitoba Conservation and the industry. While this issue was initially seen as including a role for Travel Manitoba, it was determined that is largely outside a provincial destination marketing organizations mandate. The Executive Director of the Manitoba Lodges and Outfitters Association indicated he would fill liaison role with Manitoba Conservation.
- Summit participants identified their aging customer base as a growing threat and requested that Travel Manitoba help in identifying a younger population that could constitute a new market demographic. One operator-identified suggestion was to start a rebate program for children 12-18 who fish or hunt. It was also noted that the older cohort should not be neglected in marketing initiatives as this demographic is roundly regarded as being most likely to have the means to enjoy an operator facilitated fishing or hunting experience.
- Regarding intensifying competition, one participant wondered why Travel Manitoba is unable to access federal dollars, like the Maritime provinces have done, in order to enhance international marketing efforts.
- Only half-jokingly, one participant suggested advertisements imbedded within the World of Warcraft video game (gun-minded) might be an effective means by which Manitoba can engage a new audience.

General Assessment of Travel Manitoba

Summit participants were asked to identify the strengths and weaknesses of Travel Manitoba, as well as describe their expectations of its roles and responsibilities.

Perceived Roles & Responsibilities

- Travel Manitoba was seen as an invaluable resource for broadening the horizons of Manitoba lodges and outfitters through the identification of new areas of marketing interest and highlighting professional development and training options.
- There was a strong consensus that the role of Travel Manitoba is to market the province “as a whole”. In turn, this approach is expected to increase the number of out-of-province visitors and Manitoba residents who wish to have a travel experience in this province. Operators, on the other hand, identified their own responsibility as that of closing the deal – of offering quality service that satisfies the customer and creates a lasting relationship.
- Acting as a liaison between operators and organizations or government bodies such as Manitoba Conservation, for example, was also seen as an important role Travel Manitoba to play in the Manitoba hunt/fish sector.

Critique of Travel Manitoba:

- A general concern pertained to the difference between hunters and fishers. Participants cautioned Travel Manitoba not to regard the types of clients desired by the fishing industry as being the same as those desired by hunters. Travel Manitoba indicated that efforts were being made to distinguish between the two groups and that it intends to develop a marketing awareness study for hunters once the information can be collected from the hunting license records.
- Some participants were uncertain about building further marketing partnerships with Travel Manitoba, as past collaborations have sometimes failed to result in an adequate return on investment to the operator. If partnerships are to occur in the future, industry stakeholders want to know how the partnership would work, what their money is going towards and the direct benefits they can expect to enjoy. In the words of one participant: “What Travel Manitoba is selling is not a specific sale, it is general awareness. We want specific sales pitches. We want to see specific returns back from partnerships.”
- In response to the assertion that Travel Manitoba partnerships provide an insufficient return to operators, participants were asked whether they would support individual operators receiving a higher profile in Travel Manitoba marketing based upon a higher payment level for partnership participation. There was an inconclusive response to this query. Alternatively, participants felt that it would be preferable for all individual operators to support Travel Manitoba marketing efforts. There was, however, recognition that such a solution would be unlikely. In the words of one participant: “How do you make it mandatory?” Furthermore, the reality that each outfitter has different targeted audiences was presented as a logistical barrier to group marketing.

The following table details the positive and negative aspects of the relationship that lodge owners and outfitter with Travel Manitoba.

Positive	Negative
<ul style="list-style-type: none"> • Summits • Product development workshops • Google and Facebook advertisements • Writing Tours (Outdoor Writers of Canada Award) • Partnering with NHL • Training (ex. social media workshop) 	<ul style="list-style-type: none"> • Going to NASCAR events • Hunters/Fishers Guide book issue unresolved • Lack of lead generation (due to change in privacy issues) • Partnership follow-through

Travel MB Marketing Opportunities

Prioritizing Marketing

Travel Manitoba's Shel Zolkawich presented marketing ideas to the group. From these eleven ideas participants were undertook a voting exercise to identify those which were thought to have greatest merit for Travel Manitoba in focusing its resources. The results are presented in the table below in order of what received the highest support.

	Priority Dot Placement		
	"First"	"Second"	"Third"
NHL Game Sponsorship (Toronto, Chicago, Jets, etc.)	1	5	6
Geo-targeting (MN, IL, WI) for print and online	7	2	--
Rebate Programs (spring bear, fishing, whitetail deer)	3	2	4
Trades Shows (Consumer Electronics and Safari Club in Vegas)	2	2	2
TV (Wild TV, other stations)	3	2	--
Fish/Hunt Guide (print)	1	2	1
Media Relations (fish tales media day, fishing with ford)	1	1	1
Local Radio	--	--	2
Fish/Hunt Guide (online)	--	1	--
Sponsorships (UFC, Grand Am Road Racing)	--	1	--
World Fishing Network	--	--	1
Bloggers/New Media (attending conferences, ambassadorship)	--	--	1

Industry-Generated Marketing Ideas

Participant-generated additional suggestions for Travel Manitoba marketing initiatives included:

- “I’d like to see white tail deer promoted more.”
- “I’d like to see diversification regarding what TV shows Travel Manitoba advertises with.” (e.g.: not just Wild TV, but also Midwest Outdoor TV and Sportsman’s Channel of the US).
 - The show Uncut Angling – younger guides working for us are following that like crazy (good online presence too) – reaches a younger audience.
- One participant expressed the view that the NHL spotlight advertisements should be targeted to whatever regions are the prime audience, even to the extent of removing funds from other marketing initiatives, such as print, to pay for additional NHL spotlights in key markets. “Why not go to Minneapolis for the NHL promo?”
- Tailoring to markets (in Canada focus on fishing, in States focus on hunting) with distinct promotional campaigns.

Huntfishmanitoba.ca Online Presence

Shel Zolkewich presented the recent developments of the Master Angler Online program and discussed the new huntfishmanitoba.ca website. In response to her presentation, the following comments and suggestions were made:

- “We can use this as a marketing tool – copy url to the location you’re working out of.”
- Outfitters indicated it would be useful if they could enter information quickly via a custom form for outfitters to avoid re-entering location information each time.
- It was suggested that Facebook and Twitter links be embedded in the introductory email sent to anyone who registers for the Master Angler Online system.
- For both the Master Angler online record, as well as the Hunt/Fish Guide, it was suggested that it would be a beneficial marketing tool for the lodges and outfitters if records would indicate the lodge where the fish was caught; not just the lake on which it was caught.
 - While Travel Manitoba indicated that this change would be made for the online version.
- Hunters in the group requested that the huntfishmanitoba.ca website link directly to outfitters contact information, as opposed to just listing Manitoba outfitters alphabetically. Similarly, it was suggested that a direct link to outfitter information be provided when a website viewer clicks on a specific experience, such as “black bear”.
- Participants repeatedly mentioned that the Master Anglers Online link needs to be more clearly identified on the website. Travel Manitoba explained this would happen once the site was up and running at full capacity.
- There was some opposition to the “Top 10 hot spots for fishing” as it gave an unfair advantage to specific lodges located near those spots. One participant noted “I have five lakes around me, so my supply is more varied” as an explanation for a faulty “top-10” rating.

The Printed Fish/Hunt Guide

When presented with the idea of cancelling the printed Fish/Hunt Guide, the group response was ambivalent. On the one side, this listing was regarded as “critical” to participants who identified the value of a printed copy that “acts as a record keeper that people associate with the master angler program” and can be kept around the home and shown to friends and family. There was a perceived demand for the circulation of this printed magazine at trade and sporting shows across North America, at outdoor sporting and wilderness supply stores like Cabella’s, at Airports (specifically gateway airports in the mid-west), tourism booths and at other sites that currently receive the publication.

Anecdotal support for the print copy included comments such as:

- “This helps me to get business.”
- “My customers love this book. They love to see where they rank on this every year and not everyone can afford a computer.”
- “People were specifically coming to our booth for the book.”
- “There is pride and ownership in seeing names in the book. Sentimental attachments and connection to it.”
- “This guide is about bragging rights.”
- Using the book for research was cited by one participant as a reason for keeping it. “I’ll look through the list for lakes, the time of year and how many were caught.”

Conversely, a large number of participants regarded the print version of this publication as largely a waste of staff resources and money. This view was reinforced by the knowledge that the Master Angler Online website will be recording a history of catches, combined with the advancements in social media tools. Comments in opposition of the print source included:

- “I don’t use it as a marketing piece.”
- “Maybe we should allocate this money elsewhere?”

When probed for specifics about what would be required for operators to invest in advertising within the printed publication, participants requested better communication with Travel Manitoba about exactly where the book would be available (i.e. a complete listing of trades shows and airports where it would be available). All participants agreed that the distribution of the publication must be solely directed to those who actually want the printed version. Hunting outfitters or operators did not have much to say on the matter of this publication.

Suggestions for improving the Hunt/Fish Guide included:

- “There is not a lot of storytelling. There is no species listing. Maybe we could make it more robust to really give people a snapshot of fishing in Manitoba.”
- “The book would have more value if an outfitter or lodge name could be attached to the master angler entry.”
- “Maybe just list the top 100 and put the remainder of master anglers online. This would cut down 30 pages.”

- “Maybe we need to separate out the master angler listing from the fish/hunt guide. Maybe both of these will be in print, but if they are separate, we can look at printing different quantities for each.”
- “We can’t go half way with this publication. If we’re going to do it, we need to improve it.”
- A few participants were upset that Travel Manitoba and more specifically the Hunt/Fish Guide was not available at the All Canada trade show this year. It was believed that this is an excellent place to showcase the book because the “people who are going to this show have a targeted interest in travelling to Canada.” It was noted by one participant that there are various buy-in options whereby operators do not have to attend the show to have the promotional books there.

Future of the Guide

Overall, it was apparent that the information provided in the book was of value, but that it was agreed the information contained in the book needed to be in the hands of the few people who actually use it (dwindling as this group may be). Reducing the financial impact of this publication and making it cost neutral was very important for both operators and Travel Manitoba. It was suggested that subcontracting the publication to a third party might be an option worth pursuing before terminating the print publication entirely. There was no opposition with the group to tendering this publication through an RFP to a private company.

Additional Thoughts

At the conclusion of the session, participants were asked if they had additional concerns or issues that they wish to bring forth more police on the agenda for subsequent discussion. These included:

- “Figure out the book!”
- “NW Ontario is struggling, so maybe this is the time for us to get in on that market.”
- Concern was expressed that if operators contribute funds in for the general marketing of Manitoba, the provincial government allocate fewer funds to next year’s hunt/fish marketing budget.

Appendix:

Facilitator's Guide

Fish/hunt Summit Survey Results